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Amendments to the Claims:

This listing of claims will replace all prior version, and listings, of claims in the application:

Listing of Claims:

- 1 Claim 1 (currently amended): A computer-implemented method for managing
2 adding a document to a plurality of personal stored documents, comprising:
3 loading one of the plurality of personal documents the document into storage, said
4 loaded document having a document category;
5 determining the document category of said loaded document;
6 extracting information from said loaded document indicating at least one of a
7 document date, a document transaction type and a document identifier; and
8 receiving applying to said loaded document at least one processing rule document
9 handling procedure, wherein the rule is associated with the document category, and
10 wherein of said loaded document: said document handling procedure linking processing
11 rule embodies information flow knowledge between said loaded document and other to at
12 least one of said plurality of personal stored documents using the at least one of the
13 document date, the document transaction type and the document identifier extracted from
14 said loaded document, ; and
15 processing said loaded document according to the processing rule and said
16 extracted information to relate said loaded document with one or more of said other of said
17 plurality of personal documents.
- 1 Claim 2. (currently amended): The computer-implemented method of claim 1,
2 wherein the processing rule document handling procedure includes retention criteria for
3 determining how long to save the loaded document.
- 1 Claim 3. (currently amended): A computer system having a processor, a display and
2 memory, the memory including an operating environment, and a computer-readable

3 medium having computer-executable instructions for performing a method of managing
4 for adding a document to a plurality of personal stored documents, comprising:

5 computer-executable instructions for loading one of the plurality of personal
6 documents a document into storage, said loaded document having a category;

7 computer-executable instructions for determining the document category of the
8 loaded document;

9 computer-executable instructions for extracting information from said loaded
10 document indicating at least one of a document date, a document transaction type and a
11 document identifier; and

12 computer-executable instructions for receiving at least one processing rule, wherein
13 the at least one rule is applying to the loaded document a document handling procedure
14 associated with the document category, and wherein said processing rule embodies
15 information flow knowledge between said document handling procedure linking said
16 loaded document and other to at least one other of said plurality of personal stored
17 documents using the at least one of the document date, the document transaction type and
18 the document identifier extracted from said loaded document. ; and

19 computer-executable instructions for processing said loaded document according to
20 the processing rule and said extracted information to relate said loaded document with one
21 or more of said other of said plurality of personal documents.

1 Claim 4. (currently amended): The computer system of claim 3, wherein the
2 processing rule document handling procedure includes retention criteria for determining
3 how long to save the loaded document.

1 Claim 5. (currently amended): A computer program product having a computer-
2 readable medium holding computer-executable instructions for performing a method for
3 managing adding a document to a plurality of personal stored documents, the method
4 comprising:

5 loading one of the plurality of personal documents the document into storage, said
6 loaded document having a document category;

7 determining the document category of said loaded document;

8 extracting information from said loaded document indicating at least one of a
9 document date, a document transaction type and a document identifier; and

10 receiving at least one processing rule, wherein the rule is applying to said loaded
11 document a document handling procedure associated with the document category of said
12 loaded document, and wherein said processing rule embodies information flow knowledge
13 between document handling procedure linking said loaded document and other to at least
14 one of said plurality of personal stored documents using the at least one of the document
15 date, the document transaction type and the document identifier extracted from said loaded
16 document; and

17 processing said loaded document according to the processing rule and said
18 extracted information to relate said loaded document with one or more of said other of
19 said plurality of personal documents.

1 Claim 6. (currently amended): The computer program product of claim 5, wherein
2 the processing rule document handling procedure includes retention criteria for
3 determining how long to save the loaded document.

1 Claim 7. (currently amended): A method for transferring a computer program
2 product from one or more first computers to a second computer connected to the one or
3 more first computers through a communications medium, comprising:

4 (a) accessing, on the one or more first computers, computer-executable instructions
5 for adding a document to a plurality of stored document; , which the computer-executable
6 instructions when executed by a computer, performing the steps of:

7 (1) loading one of a plurality of personal documents the document into
8 storage, said loaded document having a document category;

9 (2) determining the document category of the loaded document;

10 (3) extracting information from said loaded document indicating at least one
11 of a document date, a document transaction type and a document identifier; and

12 (4) receiving at least one processing rule, wherein the rule is applying to the
13 loaded document a document handling procedure associated with the document
14 category, and wherein said processing rule embodies information flow knowledge
15 between said document handling procedure linking said loaded document and to at
16 least one other of said plurality of personal documents using the at least one of the
17 document date, the document transaction type and the document identifier extracted
18 from said loaded document; and

19 (5) processing said loaded document according to the processing rule and said
20 extracted information to relate said loaded document with one or more of said
21 other of said plurality of personal documents; and

22 (b) transferring the computer-executable instructions from the one or more first
23 computers to the second computer through the communications medium.

1 Claim 8. (currently amended): The method of claim 7, wherein the processing rule
2 document handling procedure includes retention criteria for determining how long to save
3 the loaded document.

1 Claim 9 (new): The computer-implemented method of claim 1 wherein the loaded
2 document further includes document format data specifying whether the loaded document
3 is an electronic document or a document image.

1 Claim 10 (new): The computer-implemented method of claim 1 wherein the document
2 category of the loaded document is determined by data content extracted from the loaded
3 document and matched to a pre-determined set of document categories.

1 Claim 11 (new): The computer-implemented method of claim 1 wherein the document
2 category is determined by a pre-determined category input with the loaded document.

1 Claim 12 (new): The computer-implemented method of claim 1 wherein the information
2 extracted from the loaded document is a document identifier indicating an account number
3 and a transaction date; and wherein the document handling procedure links the loaded
4 document to a set of stored documents having the account number; the document handling
5 procedure further ordering the loaded document among the set of stored documents by the
6 transaction date.

7 Claim 13 (new): The computer system of claim 3 wherein the document category of the
8 loaded document is determined by data content extracted from the loaded document and
9 matched to a pre-determined set of document categories.

1 Claim 14 (new): The computer system of claim 3 wherein the document category is
2 determined by a pre-determined category input with the loaded document.

1 Claim 15 (new): The computer system of claim 3 wherein the information extracted from
2 the loaded document is a document identifier indicating an account number and a
3 transaction date; and wherein the document handling procedure links the loaded document
4 to a set of stored documents having the account number; the document handling procedure
5 further ordering the loaded document among the set of stored documents by the transaction
6 date.

- 1 Claim 16 (new): The computer program product of claim 5 wherein the document
- 2 category of the loaded document is determined by data content extracted from the loaded
- 3 document and matched to a pre-determined set of document categories.

- 1 Claim 17 (new): The computer program product of claim 5 wherein the document
- 2 category is determined by a pre-determined category input with the loaded document.

- 1 Claim 18 (new): The computer program product of claim 5 wherein the information
- 2 extracted from the loaded document is a document identifier indicating an account number
- 3 and a transaction date; and wherein the document handling procedure links the loaded
- 4 document to a set of stored documents having the account number; the document handling
- 5 procedure further ordering the loaded document among the set of stored documents by the
- 6 transaction date.